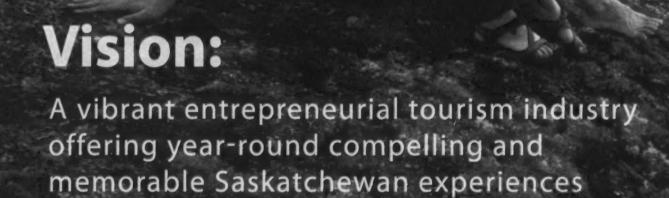
TOURISM SASKATCHEWAN STRATEGIC PLAN 2014-2016

Saskatchewan J



Mission:

Connect people with quality Saskatchewan experiences and advance the development of successful tourism operations



OVERVIEW

Tourism is one of the world's largest and most rapidly growing sectors. It is a powerful economic generator. Competition for a piece of the expanding global travel market is becoming exceedingly fierce.

In Saskatchewan, tourism contributes significantly to the economy and is a major source of employment. The province's 4,000 tourism-related businesses provide full- and part-time jobs to more than 57,000 citizens, approximately 11 per cent of the working population.

At a time when a number of global factors, such as economic strife, security concerns and a high Canadian dollar, had a negative impact on tourism in some provinces, Saskatchewan withstood the challenges and recorded steady tourism growth from 2007 onward. In 2012, travel expenditures reached \$2.12 billion. Over 12.5 million visits were made to and within the province that year.

Saskatchewan is making headlines for its thriving economy, wealth of natural resources and opportunities for employment. Its tourism resources are substantial, too, ranging from 100,000 pristine lakes to an enviable parks system to numerous festivals and attractions that showcase talent and celebrate history and culture.

The sector's most valuable asset, however, is the people who are the "heart and soul" of tourism businesses and organizations – dedicated ambassadors for their communities and for the province. A spirit of innovation, an appreciation of the land and nature and deep pride of place are characteristics common to Saskatchewan and make this province a destination that offers remarkable hospitality and experiences to last a lifetime.

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Cover: Athabasca Sand Dunes

MESSAGE FROM THE CHAIR



Like so many Saskatchewan residents, my board colleagues and I enjoy welcoming guests to our province and we are proud of the reputation that Saskatchewan has earned for its superb brand of hospitality and its success in hosting visitors and events.

We are equally pleased that tourism growth has kept a steady pace – measuring \$2.12 billion in travel expenditures and over 12.5 million visits to and within Saskatchewan

in 2012. Tourism is certainly a major factor in Saskatchewan's thriving economy and is key to a positive image for the province. A sector that employs over 57,000 citizens, its role in providing jobs and entrepreneurial opportunities and contributing to quality of life is substantial.

It has been a gratifying experience to be involved in this strategic planning exercise, motivated by Saskatchewan's potential for tourism expansion and clearly focused on a vision for the future.

Tourism Saskatchewan's Board of Directors is pleased to endorse the new Vision – A vibrant entrepreneurial tourism industry offering year-round compelling and memorable Saskatchewan experiences; and new Mission – Connect people with quality Saskatchewan experiences and advance the development of successful tourism operations.

With great confidence, we look forward to being a part of the action required to fulfil strategic priorities and achieve the goals set forth.

Norm Beug

Chair, Board of Directors

MESSAGE FROM THE CEO



It has been a privilege for me and my colleagues to be engaged in the process of planning for the future of Saskatchewan's dynamic tourism sector.

These are momentous times at Tourism Saskatchewan. The change to a Treasury Board Crown Corporation operating under the Ministry of the Economy, a new mandate and fiscal year and renewed organizational structure offer both interesting challenges and

exciting opportunities. Given the realities of a fiercely competitive global tourism industry, it is critical for us to be informed, strategic and proactive.

Saskatchewan is truly a special place – vast in size and geographically stunning with a diverse and enviable array of tourism resources. Nearly 100,000 lakes, a massive stretch of lush boreal forest and over 130 parks offer limitless opportunities for outdoor recreation. Complementing the list of tourism assets are fascinating historic sites and attractions, colourful festivals, a vibrant cultural character, dynamic urban centres and a brand of hospitality that is second-to-none. Our province is blessed with four distinct and beautiful seasons – a reality that has shaped the character of people who live here and provides a host of opportunities and experiences.

Tourism Saskatchewan's focus will be on connecting greater numbers of travellers with exceptional Saskatchewan experiences. The following pages plot a course of action that we are confident will lead to success. This is a plan not just for Tourism Saskatchewan but for tourism in Saskatchewan. It was guided by consultations with industry that made clear some of the barriers to overcome and strengths on which to build. Its goals will be achieved through collaboration – with industry, with government partners, with organizations committed to advancing the province's tourism sector.

Tourism Saskatchewan looks forward to the adventures ahead.

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Pat Fiacco CEO

TOURISM

Tourism Saskatchewan is responsible for in- and out-ofprovince marketing of Saskatchewan as a tourism destination and for programs and services that promote growth and advancement of the tourism sector. It partners in industry-government marketing programs, provides visitor services, undertakes market research and leads tourism product development, including programs with a particular focus on supporting major sporting and cultural events.

The organization was initially created in 1994 though *The Tourism Authority Act* that established an independent body committed to advancing tourism in the province.

In 2012, the Government announced that Tourism Saskatchewan would become a Treasury Board Crown Corporation. Influencing this decision were points identified in a review commissioned by the Government of Saskatchewan in 2009. A Review of the Tourism System in Saskatchewan and its findings were made public in March 2012.

Four specific items were identified by Government that would align Tourism Saskatchewan's activities and focus with the Government's agenda:

- 1. Better coordination of the provincial image;
- Lead, with input from the tourism industry and stakeholders, a long-term vision for tourism in Saskatchewan;
- 3. Develop an event hosting strategy for Saskatchewan;
- Conduct a functional review of the organization within the guidelines issued to all government ministries.

On July 1, 2012 The Tourism Saskatchewan Act was proclaimed and a new skills-based Board of Directors appointed. Operating under the Ministry of the Economy, work and activities are aligned with Government's vision, priorities and goals. This collaboration and alignment aims for greater efficiencies in the delivery of services, fosters economic growth and contributes to quality of life and opportunities for Saskatchewan citizens. Additionally, this effort establishes consistent, more widespread, positive messaging about Saskatchewan as a great place to live, work, invest and visit.

Tourism Saskatchewan's CEO is responsible for all operational activities and Executive Office serves as the main interface between the corporation, the Board of Directors and Government. Three divisions manage the work undertaken to achieve the goals set forth in the strategic plan. These divisions are 1) Marketing and Communications, 2) Industry and Community Development, and 3) Corporate Services.

NEW MANDATE

The Tourism Saskatchewan Act, proclaimed in 2012, identifies the corporation's prescribed mandate. Tourism Saskatchewan's functions are:

- Saskatchewan as a tourism destination in domestic, national and international markets;
- Saskatchewan's tourism industry operators to market their products;
- the quality of tourism products and services in Saskatchewan;
- visitor information services; and
- any other activities or functions assigned by the Lieutenant Governor in Council.



TOURISMIN

THE VALUE OF SASKATCHEWAN'S TOURISM SECTOR

Tourism contributes significantly to the Saskatchewan economy, generating over \$2.12 billion in travel expenditures in 2012. Over 12.5 million visits were made to and within the province that year.

The Conference Board of Canada's preliminary findings for 2013 (January – June) indicate Saskatchewan's tourism sector to be among the top three performers in Canada. Overall, sector growth for Saskatchewan is estimated at 5.3 per cent over the same period in 2012 (slightly behind Newfoundland/Labrador's 5.5 per cent growth rate and ahead of Alberta's 4.9 per cent). Average tourism sector growth for Canada is an estimated 3 per cent.

Saskatchewan had the second largest hotel occupancy rate (after Newfoundland/Labrador), recorded at 66.2 per cent. There was 4.1 per cent growth in room supply, a 4.8 per cent increase in room rates and REVPAR (revenue per available room) increased by 3.8 per cent.

Direct border entries for one or more nights from the United States to the end of June were up slightly (1.6 per cent) ahead of the overall Canadian average (0.5 per cent). This is after growth of 6.9 per cent in United States direct entries for one or more nights in 2012.

ENHANCING COMMUNITIES THROUGH EMPLOYMENT AND OPPORTUNITIES

Tourism is a sector of five industries:

- Accommodation:
- Food and Beverage;
- Recreation and Entertainment:
- -Transportation; and
- Travel Services.

Virtually all other areas of business or commerce are influenced by activities in tourism.

A vibrant tourism sector, one committed to product and service excellence, reflects a positive image for a destination and contributes to the success of other businesses.

Saskatchewan has approximately 4,000 tourism-related businesses that provide full- and part-time employment to over 57,000 citizens, 11 per cent of the working population. There are twice as many people employed in tourism-related jobs than in the mining and oil and gas sectors combined.

Saskatchewan's tourism sector is 95 per cent small- or medium-sized businesses, with a large segment of those located outside of the province's two major cities. Seventynine per cent of tourism businesses and events are situated in communities other than Regina and Saskatoon, and 51 per cent of tourism-related employment is in these areas.

TOURISM BENEFITS QUALITY OF LIFE

A strong, healthy tourism sector benefits Saskatchewan citizens on many levels. It contributes to the quality of life through public investments in infrastructure, transportation, provincial and regional parks, cultural activities, attractions, events, recreational facilities and other areas.

Tourism is a valuable source of tax revenue for all levels of government. In 2012, tourism in Saskatchewan generated \$5.79 million in total taxes.

\$280 m	illion
	11111/2/11

Tourism is an important export industry. Export revenue for 2012 totalled \$576.6 million. This is new money coming into our province, staying in our province, and benefitting cities and towns, municipalities, communities and the people who live and work in Saskatchewan.

WHAT ARE THE BENEFITS OF A VINUANT TOWARSM SECTION?

- · Increased profile
- · Positive image
- · Employment opportunities
- · Increased tax revenues
- · Greater resident pride
- Increased volunteerism
- · Greater commitment to service excellence
- · Greater diversification of tourism infrastructure
- · Greater selection of experiences
- Improved services and amenities shopping, recreational facilities, accommodations, restaurants, cultural facilities, health facilities
- · Improved transportation and communications services
- · Favourable lifestyle changes

WHAT GOODS AND SERVICES

- Accommodations
- Meals
- Transportation
- · Tours
- Entertainment
- · Recreation
- · Attraction and event tickets
- · Shopping and local products
- Additional services

HOW DOES THE INDUSTRY CONTINBUTE TO THE LOCAL ECONOMY?

- · Taxes collected on services and products
- · Wages and salaries
- · Local businesses supported
- · Utilities, services used
- · Goods purchased
- Capital investments
- · Transportation of goods
- · Commissions to agents
- · Legal and professional services
- · Marketing and advertising purchased
- · Investments in infrastructure
- · Community revitalization and improvement

WHO REMERTS

- · Hotels
- Bed and breakfasts
- Parks
- Campgrounds
- Restaurants and clubs
- · Local shops and retailers
- · Wineries
- · Wine and spirit providers
- · Farmers markets
- · Local food producers
- · Theatres
- · Galleries
- · Artists and entertainers
- Cultural institutions and attractions
- · Health clubs and services
- · Recreational facilities
- Taxi drivers
- · Car rentals
- · Travel agents
- Airports
- · Air, bus and rail lines
- Trucking companies
- · Gas stations, automotive services
- Trades construction companies and employees, electricians, plumbers
- · Architects and builders
- Manufacturers
- Media
- · Advertising and communications firms
- · Banks and credit unions

SASKATCHEWAN'S TOURISM MARKETS

Saskatchewan's primary travel market is its own residents, who accounted for 86 per cent of visits to tourism businesses, attractions and events in 2012 and 71 per cent of overnight or longer visits. Of the 10.8 million resident visits, 7.3 million were same-day trips, while stays for one or more nights numbered over 3.5 million.

Total travel expenditures for the resident market were \$1.4 billion with an average per person spend of \$129.23. Resident spending on overnight or longer visits was \$712.9 million with an average spend of \$200.60.

Alberta is the second-largest market, with residents of that province making 811,000 visits here in 2012 for 6 per cent of total Saskatchewan visits. They account for 14 per cent of overnight or longer visits and \$206 million or 10 per cent of expenditures. Of those visits, 104,000 were same day and 707,000 for one or more nights. Albertans spend an average of \$278.07 on overnight or longer visits.

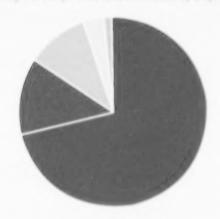
For both markets – Saskatchewan residents and Albertans – the primary reason for overnight or longer visits is visiting family or friends, followed by pleasure or vacation trips.

Travellers from the United States (overnight or longer) numbered 147,000 in 2012, for 3 per cent of overnight or longer visits. Travel expenditures from this market totalled \$86.1 million, with an average per person spend of \$573.98.

Hunting and fishing were the primary attractions for 57 per cent of these visitors. The remainder were largely pass-through visitors, crossing Saskatchewan on their way to other destinations in western Canada or to Alaska.

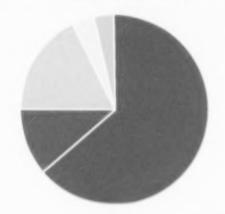
Measuring 58,800 overnight or longer visits in 2012, the overseas market accounted for 1.1 per cent of travel to Saskatchewan and \$80.2 million in expenditures. Europeans, primarily from the United Kingdom or Germany travelling for vacation/pleasure or to visit friends and family, are the largest segment. Thirty-six per cent of travel is from Asia and the Pacific region – the Philippines, Australia and China. Motivation to travel to Saskatchewan includes university study, visiting family, business travel or short-term work. The average spend by international visitors is \$1,363.83.

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- Overseas: 58,800 1%
- United States: 147,400 3%
- Other Canada: 517,000 10%
- M Alberta: 707,000 14%
- Saskatchewan: 3,554,000 71%

Expenditures on Overnight or Longer Visits by Origin 2012.



- Overseas: \$80,193,000 6%
- United States: \$84,604,000 7%
- Other Canada: \$213,674,000 17%
- Alberta: \$196,596,000 15%
- Saskatchewan: \$712,937,000 55%

TOURISM SASKATCHEWAR 2014-2014

STRATEGIC PLANNING PROCESS

SaskTel Saskatchewan Jazz Festive

PLANNING PROCESS



With the passing of *The Tourism Saskatchewan Act* on July 1, 2012, Tourism Saskatchewan's newly appointed Board of Directors was established. By mid-November, a new Chief Executive Officer was named.

A new organizational structure was put in place. Three divisions report to the CEO: 1) Marketing and Communications, 2) Industry and Community Development and 3) Corporate Services. Executive Office, along with the Executive Directors of each division form the Executive Leadership Team (ELT).

A change to Tourism Saskatchewan's fiscal year, from October 1-September 30 to April 1-March 31, further complemented the alignment with Government.

Strategic planning was a top priority for the Board of Directors and the ELT. A Request for Proposals was issued and the Tourism Planning Group was contracted to lead the process. The work would entail establishing a direction and strategic priorities with a vision to 2020 as motivation – a vision not just for the organization but for tourism in Saskatchewan.

Out of this high-level planning process would emerge a framework for developing a rolling business plan. Focusing on serving the best interests of the tourism sector, the process was designed to:

- Gain a clearer understanding of the "bigger picture";
- Develop a corporate strategy responsive to today's challenges and opportunities;
- Engage stakeholders and consult with industry; and
- Reposition tourism as a critical component of the economy.



From the onset, consultation with industry was a priority. In February, a survey was emailed to 2,543 Tourism Saskatchewan contacts. The survey received a strong response, 14 to 19 per cent depending on the question.

Its purpose was to gather information on marketing activities, plans for capital investment, current challenges, awareness of Tourism Saskatchewan's responsibilities and services and other timely issues.

The information collected was critical to the first strategic planning meeting. The Board of Directors, ELT and consultant gathered in February for a two-day retreat. The agenda involved drafting a preliminary Vision statement, discussing Mission and Corporate Values in relation to this vision and identifying strategic priorities and a course of action for achieving the aspired goals.

Industry consultations took place throughout the spring. Telephone interviews were conducted by the consultant with 41 individuals representing a range of tourism businesses and associations, and a number of Saskatchewan communities. They were provided, in advance, with an overview of the draft strategic framework, Vision/Mission statements and Corporate Values. The sessions yielded valuable information and gave stakeholders a chance to share their views on where efforts should focus in order to strengthen and grow the industry and achieve the draft Vision.

In May, two workshops facilitated by the consultant were held in Saskatoon. Both involved participation by the ELT. Representatives of destination marketing organizations in Regina and Saskatoon and key industry associations were invited to the first workshop. They were provided with a

background paper in advance. Topics for discussion included the current operating context and industry challenges, the draft strategic framework and steps necessary to move tourism in the province to the next level.

The second meeting brought together representatives of a number of destination marketing organizations and destination areas. In addition to reviewing the draft documents and discussing current challenges, this group shared insights on Saskatchewan's unique attributes and "selling" these experiences to travellers. The workshop was also an opportunity to discuss Tourism Saskatchewan's role in facilitating the growth of community and destination area tourism.

Tourism Saskatchewan's ELT and senior management participated in a two-day facilitated session to review the information gathered during previous workshops and draft key actions for the next three years.

In June, the Tourism Planning Group submitted its draft report. Further discussion of the draft statements followed and, in July, the Board of Directors gave final approval to a new Vision and Mission and to Corporate Values and Guiding Principles that chart a course for Tourism Saskatchewan – one that will lead to tourism growth and greater awareness of Saskatchewan as a destination.



OPERATING

GLOBAL FACTORS

There are a number of factors, on a global scale, that have an impact on Saskatchewan's tourism sector.

Economic uncertainty – Recovery from the global recession is uneven. This fact, coupled with fluctuations in exchange rates increases challenges in building international demand. A strong provincial economy is playing a key role in maintaining the domestic visitor numbers. At the same time, greater wealth in the province sees residents looking beyond our borders and contributes to growth in outbound travel.

Global competition – The choice of compelling destinations to visit is expanding. Increased marketing investments by other countries and heightened emphasis on establishing strong and emotive destination brands is reducing inbound travel to Saskatchewan and increasing outbound travel from the province.

Traveller expectations – There is a growing demand for engaging experiences, authenticity and quality. Visitors are seeking experiences that are memorable and enable them to connect emotionally with a destination. Given this reality, destinations that deliver these experiences and are investing in product and services to match expectations are capturing a considerable share of the travel market.

Demographics – Awareness and understanding of current social and cultural trends are critical to developing tourism products and experiences and being competitive. The travel patterns of retiring babyboomers, the shift in lifestyle values toward a greater consumer focus on sustainability, immigration trends and the growing number of new Canadians, along with the relative youthfulness of the province's population are all factors that need to be given consideration.

Technology – New technologies and rapidly changing trends demand a proactive approach. As the consumer continues to influence the message, it is becoming critical to focus on all existing and potential technological touch-points with the visitor during the "path to purchase."

CHALLENGES TO GROWTH

In addition to global issues, there are recognizable challenges that compromise Saskatchewan's ability to compete and capture a fair share of the lucrative global travel market.

Consultations with industry identified a number of barriers:

- Aging product and infrastructure (road conditions, tourism signage, public rest stops/washrooms)
- · Limited marketing budgets for small operators/businesses
- Limited budget for marketing the province and competition from neighbouring provinces (Alberta, British Columbia)
- Misunderstanding of tourism some businesses/ communities fail to see themselves as part of the sector
- Deficit of operators who are market/export ready
- Undeveloped experiential tourism opportunities, lack of diversity in experiential offerings
- Shortage of skilled and unskilled labour
- Lack of Saskatchewan inbound tour operators
- Limited capacity to accommodate higher numbers of visitors
- Inconsistent standards and quality of service
- Lack of succession planning
- · Air access and transportation issues
- Decline in American hunt and fish markets
- · Ongoing growth in resident outbound travel
- Federal policies affecting National Parks







OPPORTUNITIES

There is no denying that Saskatchewan is a special place - one that has many of the attributes that travellers seek in a destination. Given the province's list of tourism assets and opportunities, there is great potential for building on the sector's strong foundation and developing tourism products and new markets.

Unique selling propositions:

- Four-season destination with potential to develop winter product, expand hunting and fishing opportunities
- Geographic diversity, impressive landscapes, wondrous natural features
- · Vast open spaces, magnificent "living skies"
- Pristine environment clean air, abundance of fresh water, sense of tranquility
- First Nations and Métis culture/history
- Settlement history colourful tapestry of cultures and traditions
- Agricultural story major world food provider
- Locally grown products, culinary experiences
- Science and innovation, resource-rich province
- Exceptional reputation for hospitality and success in hosting events - outstanding volunteer core
- Best of both worlds impressive urban centres against a backdrop of nature
- Unique festivals and events year-round activities
- Enviable quality of life

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STRATEGIC

STRATEGIC PRIORITIES

Guided by its new Vision, Mission and Values, along with current research and the knowledge gathered from industry, Tourism Saskatchewan has identified three Strategic Priorities. Success and growth of the sector will be achieved by dedicating resources and efforts to the following:

MARKETING SASKATCHEWAN EXPERIENCES

Key Actions:

- Create and implement a strong tourism identity for Saskatchewan that instils pride in residents and resonates with visitors
- Generate excitement about Saskatchewan's tourism experiences in key markets to increase awareness, visitation and expenditures through the following tactics:
 - Review geographic and product/experience markets to identify and prioritize key markets
 - Develop a market readiness program
 - Develop a comprehensive market plan that is in full alignment with the tourism identity
- Lead and engage tourism stakeholders to promote alignment in marketing strategies

VISION

A vibrant entrepreneurial tourism industry offering year-round compelling and memorable Saskatchewan experiences

MISSION

Connect people with quality Saskatchewan experiences and advance the development of successful tourism operations

GUIDING PRINCIPLES:

- Alignment align our activities, internally and with stakeholders
- Collaboration collaborate for the mutual benefit of the organization and our stakeholders
- Market-driven ensure initiatives are market-driven
- Accountable to industry, public taxpayers and Government

CORPORATE VALUES:

- Nurture a vibrant and creative organization dedicated to serving the industry and the visitor
- Empower each other and our stakeholders to be innovative and to take risks
- Work collaboratively to build effective, respectful relationships and an inclusive approach for the purpose of delivering excellent results

DEVELOPING SASKATCHEWAN EXPERIENCES

Key Actions:

Champion industry excellence to build unique and memorable Saskatchewan experiences through developing and implementing the following:

- Quality Experience Strategy
- Tourism Human Resource Strategy
- Major Event Hosting Strategy

Build a supportive environment through partnerships that enable the sector to fully realize its potential through:

- Identifying opportunities to align activities with nontraditional partners
- Strengthening tourism opportunities in strategic destination areas and product clusters

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Vision: Saskatchewan will be an enticing destination that attracts and successfully hosts national and international events. The Event Hosting Program will support events that contribute to the provincial economy and enhance quality of life for residents

Mission: To assist stakeholders in attracting and hosting events through promotion, collaboration, advice and financial support

Tourism Saskatchewan's role:

- Awareness
- Collaboration and Communication
- Accountability

SANCHALLY EXPERIENCE

For Saskatchewan to be competitive as a travel destination, commitment and investment are required to expand the inventory of unique and memorable experiences. A goal of 100 Quality Tourism Experiences is part of the vision for tourism in the province by 2020.



FOSTERING OPERATIONAL EXCELLENCE

Key Actions:

Develop and utilize systems and processes to support effective communication and knowledge sharing

Identify and integrate innovative and creative solutions to achieve continuous improvement

Support an internal culture that encourages continuous employee development to ensure a committed and engaged workforce

TO A SHOULD BE A SHOWN

To ensure programs and services are relevant, effective and appropriate to the needs of industry and stakeholders, as well as aligned with government priorities, Tourism Saskatchewan will engage in Program Review. Eight program streams will be examined over a revolving three-year schedule.

MEASURES

Flip Eatery & Drink Regina

MEASURES

1. Marketing Results	Total impressions generated		732 million
2. Marketing Results	Direct economic impact	\$	41.84 million
3. Marketing Results	ROI for every \$1 spent on advertising	\$	40
4. Marketing Results	Total consumer contacts made to and with Tourism Saskatchewan		2.4 million
5. Marketing Results	Total industry partners involved in marketing activities		1,329
6. Marketing Results	Total expenditure of industry partners involved in marketing activities	5	904,752
7. Events	Total events supported by Tourism Saskatchewan	,	16
8. Events	Total expenditure of events supported by Tourism Saskatchewan	\$	1.2 million
10. Training Delivery	Participants in training programs		3,329
11. Quality Assurance Programs	Accredited tourism operators		na
12. Product Development*	Quality Tourism Experiences		na
A. Tourism Revenues	Total expenditures by travellers in Saskatchewan	s	2 billion
8. Visits	Visits both same day and overnight in Saskatchewan		11.9 million
C. Events	Economic impact generated by major events supported by Tourism Saskatchewan	5	na
D. Employment	Number of individuals employed in a tourism-related profession		57,300

^{*} New programs to begin implementation in 2014-15

^{**} Tourism Saskatchewan contributes to the achievement of broader tourism industry outcomes such as increases in tourism revenue and visits. The efforts of other destination marketing organizations, as well as small- and medium-sized enterprises also have an impact on the performance of the sector. Given that it is difficult to link the results in the tourism sector directly to the efforts of Tourism Saskatchewan, targets for industry performance indicators have not been set.

